

# Planning for Success

# 1

## Planning Services

The first thing to do when considering services to adults with special needs (ASN) is to create a plan. Some advance planning and preparation can go a long way in helping a library make wise programming choices. Because resources are limited, staff of public libraries need to identify priorities and offer those services that will meet a community need and deliver the greatest benefit. The planning process and the planning document do not need to be lengthy or involved. The extent of the planning effort depends on the staff and budget resources the library is willing and able to devote.

Planning is a continual cycle of assessment, forecasting, goal setting, implementation, and evaluation. A library that maintains a regular planning cycle can emphasize various aspects at different times. Or, after examining community demographics and talking to others in the community, a library may decide to focus on one particular special needs group. The amount of work to be invested in every step depends on library resources and past planning efforts. But no matter the size of the library, it is important to know the library and the community and its needs before deciding on how best to serve ASN.

The plan itself can be short and simple enough to fit on one page or less, but it is important to be clear about where the library is headed, how ASN will benefit, and exactly what will be accomplished and when. The library should be able to recognize success when it happens and make midcourse corrections when necessary. Written plans help clarify ideas that in turn provide the information needed for good communication with the library staff and the community.

Regardless of the exact size and shape of the effort, planning for services to ASN should include the following seven basic steps:

1. Look at the library.

Answer questions such as the following:

Who uses the library?

What barriers might there be to use of library services for ASN (facilities, collection, services)?

Are some library services specially designed for ASN?

What services have been requested?

Does the library meet or exceed *Wisconsin Public Library Standards* (Wisconsin Department of Public Instruction, Division for Libraries, Technology, and Community Learning 2000) in service to ASN? Are there standards that the library does not meet? (See appendix 3 of the current work for a list of some of the standards.)

What services to ASN are available through the library's system membership?

Possible approaches:

Examine the library's regularly collected statistical measures.

Consult the current issue of the *Wisconsin Library Service Record* (Zimmerman 2002) and compare the library to others of similar size.

Contact DLTCL for statewide survey results.

- Conduct a facility accessibility inventory (organizations such as independent living centers offer such services).
- Consult *Wisconsin Public Library Standards* (Wisconsin Department of Public Instruction, Division for Libraries, Technology, and Community Learning 2000).
- Contact the system's special needs consultant.
2. Look at the community.
- Answer questions such as the following:
- What are the demographics of the community? Which special needs groups are represented?
  - What community organizations and agencies provide services to ASN?
  - What community services are available to ASN?
  - What community, state, and societal trends should be taken into account when planning?
- Possible approaches:
- Consult population data provided periodically by the DLTCL.
  - Consult the U.S. census data at the Wisconsin Department of Administration's Demographic Service Center at <[www.doa.state.wi.us](http://www.doa.state.wi.us)>.
- Check with the following agencies:
- County extension agencies
  - Social service agencies
  - State agencies
3. Identify the needs of ASN.
- Answer questions such as the following:
- What needs of ASN are not being met? What are the areas of greatest need?
  - Are there materials or services that the library could offer to better meet the needs of ASN?
  - What barriers exist to library use by ASN?
- Possible approaches:
- Survey organizations and social service agencies that work with ASN. Use the following methods.
    - In-person interviews
    - Telephone interviews
    - Mailed questionnaires
    - Group meeting
  - Survey ASN. Use the following methods.
    - In-person interviews
    - Telephone interviews
    - Mailed questionnaires
    - Group meeting
4. Analyze collected information and identify programs and services to meet the needs of ASN.
- Answer questions such as the following:
- What are the areas of greatest need?
  - What needs can the library most appropriately address?
  - What staff skills, materials, and facilities does the library require to address the needs?
  - What should be the library's priorities in serving ASN?
  - Are there organizations or agencies the library could collaborate with to meet needs?
- Possible approaches:
- Look at demographic information, current services, and expressed needs of ASN.
  - Assess the gap between current services and expressed needs.
  - Involve library system staff, ASN, and agency representatives in reviewing draft findings.
  - Use informal conversations, interviews, advisory committees, and e-mail to gather input.

5. Write the plan.

Answer questions such as the following:

Who will write the plan? Who will review it?

What benefit will ASN receive because the library provides a service? (Goal)

How will the library measure its progress toward reaching the goal? (Objective)

What specific strategies will the library undertake to achieve the goals and objectives? (Activities)

6. Evaluate the library's impact on serving ASN.

Answer questions such as the following:

How will the library check on its progress? Who will be responsible?

Are the planned activities resulting in progress toward the goals and objectives?

What problems are being encountered?

How can the library improve? What needs to change?

7. Tell what the library is doing to serve ASN.

Answer questions such as the following:

Who needs to hear about the library's plan? Inside the library—staff, administration, trustees? Outside the library—ASN, persons involved in the planning process, library users, community organizations, government officials? Is formal plan adoption by the library board necessary or desirable?

What should be communicated?

What is the best way to get the message out?

Possible approaches:

Craft the message to match the audience.

Use appropriate formats (e.g., large print, audio, Spanish).

Talk about the work at budget presentations, board meetings, staff gatherings, community talks or meetings, media interviews, and conference speeches.

Write about the work in newsletters, memos, annual reports, news releases, library publications, and displays.

## Measuring Progress

Evaluation is an important part of the planning cycle. The clear goals and measurable objectives written during the planning process can indicate whether the library is headed in the right direction. Is a program effective as designed, or are changes required? What improvements can be made? Is the library making progress in achieving the goal? Is the goal one the library should continue pursuing? An evaluation is also an important communication tool. It provides information the library can use to let people know the difference the library is making in the community. As a public institution accountable to and dependent on taxpayers, the library needs to talk about the return the community is receiving on its investment.

Designing an evaluation program and writing measurable objectives when planning services to users with special needs can be challenging. One reason is that libraries do not usually collect user statistics based on a special need; in addition, users with special needs may not be easily identifiable. Also, progress may be incremental when working to overcome long-standing barriers to public library use by persons with special needs. That said, it is still important to determine the effectiveness of a program and to communicate its benefit to the community. How can that be done?

First, do not identify a measure that is so burdensome to collect that it is unlikely to be done. Make the evaluation process as simple, easy, and accurate as possible. Think about procedures the library already uses and how they might be applied. If the library does not currently collect the needed information, how

can it be gathered? Keep in mind that comparison statistics are important. Collect “baseline data” before the program begins. Ensure that the measures chosen help the library determine its progress in reaching the goal.

*The New Planning for Results* (Nelson 2001), an American Library Association planning guide, outlines three basic types of measures:

1. Count the number of people served by a service or program.
  - a. Count a person once no matter how often he or she uses a service (total number of different users).
  - b. Count a person every time he or she uses a service (number of times a service is used).
2. Ask the people being served how well a service met their needs (e.g., through surveys, focus groups, or interviews).
3. Count the number of service transactions that were provided by the library (e.g., circulation, number of reference transactions).

The time to think about the evaluation is when the objective is written. Ask: Who will collect the needed information, when will the information be collected, and how will it be collected? When writing the objective, include the following three elements (from Nelson 2001):

- a measure,
- a standard against which to compare that measure, and
- a date or time frame by which time the standard should be met.

Here are some sample objectives.

#### NUMBER OF PEOPLE SERVED

By (the date) all library staff (the standard) will attend a disability awareness training session (the measure).  
Ten families (the standard) will attend a family literacy event (the measure) by (the date).  
Twenty-five percent of persons attending family literacy events (the standard) will apply for a library card (the measure) by (the date).

#### HOW WELL THE SERVICE IS PROVIDED

By (the date) 75 percent of library staff (the standard) will report that the disability awareness training program helped them provide better service to library customers with special needs (the measure).  
By (the date) at least 75 percent of persons with a physical disability who visit the library (the standard) will indicate that the library does a satisfactory or more than satisfactory job in eliminating physical barriers within the library (the measure).

#### SERVICE TRANSACTIONS

Electronic Spanish language materials (the measure) will be accessed at least 50 times per month (the standard) by (the date).  
The library will receive at least five (the standard) TTY calls (the measure) every month by (the date).  
Circulation of literacy collection materials (the measure) will increase 10 percent (the standard) by (the date).

## References

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